

# SPECIALTY E & O PLAN

## SPECIALTY ERRORS AND OMISSIONS LIABILITY INSURANCE POLICY APPLICATION PUBLIC RELATIONS/PROMOTION/MARKETING FIRMS SUPPLEMENT

1. Name of **Your** firm: \_\_\_\_\_
2. List **Your** major clients: \_\_\_\_\_  
\_\_\_\_\_
3. Please complete the appropriate sections indicating the approximate percentages of **Your** total operation involving: (Must total 100%)
  - \_\_\_\_\_ % Marketing Consulting
  - \_\_\_\_\_ % Direct Mail design and distribution
  - \_\_\_\_\_ % Mailing list brokering
  - \_\_\_\_\_ % Mailing list creation and maintenance
  - \_\_\_\_\_ % Data Warehousing/Data Processing
  - \_\_\_\_\_ % Desk top publishing design/layout
  - \_\_\_\_\_ % Graphic Design
  - \_\_\_\_\_ % Promotion/Sweepstakes/Contests/Coupon Design
  - \_\_\_\_\_ % Promotion/Sweepstakes/Contests/Coupon Administration
  - \_\_\_\_\_ % Fulfillment Services
  - \_\_\_\_\_ % Commercial Printing
  - \_\_\_\_\_ % Catalog Design/Publishing/Distribution
  - \_\_\_\_\_ % Advertising Agency Services
  - \_\_\_\_\_ % Public Relations Consulting
  - \_\_\_\_\_ % Package/Custom Software Development
  - \_\_\_\_\_ % Telemarketing
  - \_\_\_\_\_ % Investor Relations
  - \_\_\_\_\_ % Other (Describe) \_\_\_\_\_
4. Do **You** use subcontractors? \_\_\_\_Yes \_\_\_\_No If yes, advise:
  - (a) For what services: \_\_\_\_\_  
\_\_\_\_\_
  - (b) Approximate percentage of time subcontractors are utilized: \_\_\_\_\_ %
  - (c) Do **You** require they maintain E&O insurance? \_\_\_\_ Yes \_\_\_\_ No
  - (d) Please attach copy of contract used with subcontractors.
5. (a) Are **You** involved in the development or design of copyrighted materials, trademarks, logos, packaging or display design? \_\_\_\_ Yes \_\_\_\_ No
  - (b) The total number of trademarks you develop each year \_\_\_\_\_.  
Attach description of **Your** legal review or other procedures used for clearing trademarks, copyrighted material or other intellectual property.

6. Do **You** utilize outside legal counsel for review and/or consultation on personal injury and intellectual property matters? \_\_\_\_\_Yes \_\_\_\_\_No If yes, please advise name of attorney and firm.
7. Do **Your** activities involve set-up and/or management of promotional games, contests, lotteries, sweepstakes, or other games of chance? \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, please provide details including specific contracts.
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
8. Do **Your** contracts always require **Your** client to sign off on all press releases, advertising or promotional materials prior to dissemination? \_\_\_\_\_ Yes \_\_\_\_\_ No

**THIS PUBLIC RELATIONS/PROMOTION/MARKETING FIRMS SUPPLEMENT IS ATTACHED TO AND FORMS A PART OF THE SPECIALTY ERRORS AND OMISSIONS LIABILITY INSURANCE POLICY APPLICATION. IT IS SUBJECT TO THE SAME PROVISIONS CONCERNING REPRESENTATIONS MADE AS IN THE BASIC APPLICATION.**

\_\_\_\_\_

Date

\_\_\_\_\_

Your Signature/Title

**NOTE: THE SIGNATURE MUST BE THAT OF AN ACTIVE OWNER, PARTNER OR EXECUTIVE OFFICER OF YOUR FIRM.**